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NODA Note No. 14

## A MARKET ANALYSIS OF DESIRED ECOTOURISM OPPORTUNITIES IN NORTHERN ONTARIO

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### INTRODUCTION

This note focuses on forest based ecotourism<sup>1</sup> activities, and identifies those opportunities that are desired by the visitors who make up the latent ecotourism market for northern Ontario. Equipped with this information, it is then possible to match the demand side (desired ecotourism opportunities) to the supply side (existing ecotourism opportunities) of the region's ecotourism demand-supply relationship.

In northern Ontario, and across Canada in general, the traditional view of forests as a source of timber and timber industry related employment is expanding to include public use and noncommodity values. With such evolving perceptions come changes in the definition of appropriate forest use and, indeed, changes in the nature of the relationship between society and forests. The future success of forest managers in northern Ontario will be judged by how well they develop policies that fulfil both timber and nontimber values. In northern Ontario, three major issues contribute to the complexity of this task.

First, northern Ontario has traditionally been oriented toward the timber industry. It is now recognized, however, that past forest management practices have resulted in unanticipated impacts on the environment, and society is struggling to redress or cope with these. Associated with this,

the Canadian public's attitude toward resource use is changing, but traditional management practices have not adequately responded. It should be remembered that three out of four Canadians view the forest as a national treasure to be held in trust for future generations.

Second, it is recognized that the sustainability of Canada's forests encompasses three components: environmental sustainability, economic sustainability, and social sustainability. To achieve sustainability, forest managers must acknowledge that the benefits from Canada's forests should be diverse and multiple. Therefore, forest management systems must adopt a multivalued management approach. Such an approach must also reflect the values and priorities of the public owners of Canada's forests. Carrow (1993), a forestry economist, has argued that an increased revenue base could come from nonextractive, people-related activities in the forest, and that successful forest management must adopt a truly integrated resource management approach.

Third, the forest also comprises a major part of the Canadian landscape, which is the backdrop for a multimillion dollar industry in tourism and outdoor recreation. Ecotourism, now recognized as a viable, long-term use of Canada's forests, can contribute to the development of sustainable forestry policies that build upon the concepts of integrated resource management (Scace et al. 1992). Nature-based

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1 Ecotourism is defined as the use of an area for outdoor recreation travel experiences that conserve the natural environment and improve the welfare of the local people (NODA 1994). Outdoor recreation is "all those activities of a recreational nature resulting from our interests in the environment and our relationship to its elements" (Sessoms 1984, p. 238).



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tourism, or ecotourism, is now the fastest growing sector of both the Canadian and international tourism markets. Given the vast expanse of forest wilderness in northern Ontario, a potentially large market for forest-based ecotourism exists within this region. To date, it has been relatively untapped. While contributing to the conservation and management of natural areas, ecotourism also provides an alternative means of generating local economic benefits and employment (Lindberg 1994).

Assessment of Ontario's special outdoor tourism reveals that ecotourism is one market that awaits major development (Marshall, Macklin Monaghan Limited 1992). The Ecotourism Opportunity Identification Study (Development Consulting Limited 1991) also indicates that ecotourism in Ontario has experienced constant and significantly higher growth than have other areas of tourism, has been comparatively recession resilient, and has a potentially higher value added component than does conventional tourism.

If efficient marketing strategies are devised to accurately target appropriate segments of the ecotourism market, the potential exists for forest-based ecotourism in northern Ontario to become a multimillion dollar industry. Ecotourism would have a major impact on local economies and generate employment opportunities that otherwise do not exist. Beyond these economic and social benefits, ecotourism would also promote multiple use of northern Ontario's forests, add to the conservation and preservation of these forests, and in so doing support sustainable forestry.

The aim of this project is to assess the viability of ecotourism as a multipurpose, nonconsumptive alternative use of northern Ontario's forests. The project builds on the work of Wolfgang Haider<sup>2</sup> who has indicated that the latent ecotourism market of northern Ontario consists primarily of those individuals living in northern and southern Ontario, the bordering provinces of Manitoba and Quebec, and the northern states of the United States who have previously recreated in a wilderness or near-wilderness setting.

## METHODOLOGY

The planning and management of ecotourism/outdoor recreation opportunities has evolved into a consideration of the recreation activities, resource settings, and expected psychological outcomes or benefits of the experience. These concepts form the basis of the "behavioral approach", which suggests that recreation choices can be explained in terms of goal directed human behavior (Driver and Tocher 1970). People engage in activities in specific settings to realize a group of psychological outcomes that are known, expected, and valued (Manning 1986). In this study, desired ecotourism opportunities are conceptualized as being of three interrelated types:

1. Preferences for particular forest-based *activities* (for example, nonconsumptive activities, such as backcountry hiking, canoeing, or bird watching; or cultural/heritage activities, such as traditional native community events);

2. Preferences for particular forest *settings/environments* (for example, an unmodified pristine forest setting or a human modified forest setting); and

3. Preferences for particular forest-based *experiences* (for example, a remote wilderness experience where one encounters relatively few other visitors, or a less remote forest experience where one frequently encounters other visitors).

Previous tourist segmentation studies indicate that these desired opportunities will covary with specific socioeconomic characteristics (e.g., age, gender, ethnicity, income, marital status, family makeup, rural/urban residence, etc.)

A random, mailed survey of 2 000 potential ecotourists (visitors associated with either Mountain Equipment Co-operative [MEC] or Recreation Equipment Incorporated [REI]) was conducted in May 1994. Of the 2 000 surveys mailed (1 000 surveys, respectively, to United States and Canadian respondents), 187 were returned to sender and 779 usable responses were received. This resulted in a response rate of 43 percent. These two nature oriented recreation cooperatives were selected because they represent a potential market for ecotourism. Their clientele exhibit the socioeconomic characteristics of a general population interested in a wide variety of outdoor recreation activities; however, it should be noted that they do not represent the general population of ecotourists but a potentially large segment.

## RESULTS

A sociodemographic analysis of the sample revealed that men comprised 64 percent of the subjects. A majority of the subjects (58 percent) were married/common-law, 37 percent were single, and the remainder were divorced or widowed. Of the respondents, 41 percent had completed college/university and 31 percent had some postgraduate studies. Over half (56 percent) of the respondents reported annual incomes exceeding \$50,001; 13 percent were in the \$40,001 – \$50,000 range, 9 percent were in the \$30,001 – \$40,000 range; 10 percent were in the \$20,001 – \$30,000 range, and the remainder (11 percent) earned \$20,000 or less. Thirty-seven percent (37 percent) of the respondents were between the ages of 30–39, 27 percent were between the ages of 40–49, and 22 percent were between the ages of 20–29.

Analysis of the respondents' preferences for different activities, settings, and outcomes are presented in Appendixes A, B, and C, which indicate the average interest, desirability, and importance of different activities, settings, and outcomes, respectively. The averages are determined from all ordinal scores provided by the respondents for each question. Highlights from these results are provided below.

The interest of respondents in different activities available in northern Ontario was analyzed first. The overall mean for the activities, which were ranked from one to three, with one being not at all interested and three being very

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interested, was 1.81. The activities of greatest importance are shown in Appendix A. The top 30 activities, as listed in Table 1, included visiting parks, hiking, and flatwater canoeing. Overall, respondents showed high interest levels for many activities that would be deemed as physically demanding, e.g., multiple day hiking trip, cross country skiing, and whitewater canoeing. As well, there appeared to be a high interest for nature-based activities, such as visiting parks and wildlife viewing. At the bottom end of the spectrum were winter activities, hunting, and to a lesser extent, water-based activities. With a better appreciation for the types of activities that potential visitors considered important, it was then necessary to determine the types of settings desired by the respondents.

**Table 1.** Respondents' interest for the "top 30" activities as measured by averages from a three point ordinal scale.

Activity	Average*	Rank
Visiting provincial or national parks	2.56	1
Hiking, day trip	2.41	2
Flatwater canoeing, day trip	2.33	3
Hiking, multiple day trip	2.32	4
Visiting waterway parks	2.32	4
Flatwater canoeing, multiple day trip	2.29	6
Cross country skiing, day trip	2.23	7
Wildlife viewing	2.20	8
Swimming	2.16	9
Whitewater canoeing, day trip	2.10	10
Using interpretive services	2.08	11
Viewing local native culture	2.07	12
Bicycling paved roads, day trip	2.05	13
Cross country skiing, multiple day trip	2.05	13
Whitewater canoeing, multiple day trip	2.02	15
Interacting with local native culture	2.00	16
Viewing human works	1.99	17
Downhill skiing	1.98	18
Bicycling paved road, multiple day trip	1.93	19
Mountain biking, day trip	1.92	20
Nature photography	1.92	20
Viewing local activities	1.92	20
Participate in educational nature tours	1.88	23
Acquiring artifacts and crafts	1.82	24
Snowshoeing, day trip	1.82	24
Sea kayaking, day trip	1.81	26
Sailing, day trip	1.80	27
Mountain biking, multiple day trip	1.79	28
Sea kayaking, multiple day trip	1.78	29

\*On a scale from one (not at all interested) to three (very interested).

When viewing settings based on an ordinal scale of one to five, with one being very undesirable and five being very desirable, the overall mean was 3.2. The most attractive settings followed the geomorphology and flora and fauna dimensions from the principal component analysis. These included the presence of lakes, the presence of rivers and streams, and the variety of wildlife. It also appeared that geomorphology (i.e., landscape) settings were more favored than were flora and fauna settings, although both were very desirable. The least desirable settings included the dimensions of human and industry influences. One of the interesting aspects within the settings was that audible contact with undesirable settings was less desirable than visual contact. Appendix B supports this claim with many examples,

including hearing sounds of logging compared to seeing evidence of logging, hearing compared to seeing all-terrain vehicles, and hearing compared to seeing powered water craft. The rationale for this argument may stem from the long distance that noise can travel when compared to the short distances over which one can see an object. Since the interest in activities and desirability of settings for a northern Ontario trip have been shown, the next logical step was to determine the importance of different outcomes that individuals want from a northern Ontario outdoor recreation/ecotourism trip.

Anticipated outcomes from a potential trip were measured on a five point ordinal scale, where one represented not at all important and five represented extremely important. The overall mean was 4.04. This suggested that most respondents found the list of outcomes quite important for their trip. The most important of these outcomes, as shown in Appendix C, revolved around the conservation theme and, to a lesser extent, around the escape theme. These can be shown by the high means for outcomes such as enjoying the sights, sounds, and smells of nature; enjoying the scenic beauty; and getting away from civilization for a while. As for the least important outcomes, the adventure/skill development and interaction themes were partly covered, although mean scores for interaction were all above 3.0 and are, therefore, somewhat important.

It is expected that sociodemographic factors will affect the demand for ecotourism through interest in activities, preference of settings, and desirability of outcomes of a trip to northern Ontario. To examine these relationships, a series of Chi square tests were conducted. These tests examined the ordinal rankings that respondents gave for preferred activities, settings, and outcomes for a future northern Ontario trip against the sociodemographic variables of nationality, income, education, and membership in either an environmental or outdoor organization. Unless otherwise stated, only those variables having Chi square measures of association and Spearman rho correlation coefficients less than 0.05 are highlighted in this report.

Canadian respondents indicated a higher interest in participating in water-based activities than did American respondents. Such activities included snorkeling, scuba diving, wind surfing, motorized water activities, water skiing, and sailing. One theme that emerged from this analysis was that people with lower incomes were generally more interested in water-based activities than were those with high incomes. This may stem from the different types of vacations available to these groups and limited information on the true cost of certain activities. Similarly, people with lower education levels also were more interested in water-based activities than were those having a higher education. Finally, respondents who belonged to outdoor or environmental groups differed from nonmembers of such groups. Those who were members of outdoor groups tended to be more interested in activities such as canoeing, sea kayaking, biking, and cross country skiing. People who belonged to environmental organizations were more interested in guided nature tours, wildlife viewing, bird watching, and nature photography.



The second analysis focused on those questions that respondents were asked regarding activity settings. Again these questions were analyzed by Chi squares obtained from cross tabulations of grouping variables and the ordinal scale for each setting (see Appendix B for this order). Once again, Canadians appeared to find water-based settings more to their liking than did Americans, and the presence of beaches and traveling on lake/river systems appealed more to Canadian respondents. Canadians also seemed to have more liberal attitudes toward viewing clear-cut forests than did Americans. Additionally, people who had high incomes preferred accessible locations. This was evident in their higher affinity for access to paved roads, and for traveling in areas with paved roads. People with lower incomes saw remoteness as a more favorable feature and were more likely to travel on gravel roads, low maintenance gravel roads, and low-standard trails or in areas with no facilities, or areas remote from emergency assistance. These disparities may be attributable to the type of vehicles that each segment owns, to the total cost for the trip, and to general differences in attitudes. Those people who belonged to an environmental organization once again appeared to find conservation settings more to their liking than did non-members. People involved in environmental organizations enjoyed relatively large forested areas, meeting no people, and areas remote from town. In all, most settings support the findings stated in the activities section.

The preferences that people showed for the outcomes from a northern Ontario trip were also analyzed. These analyses yielded two significant findings. First, there was a dichotomy between those people with high and low incomes. People with lower incomes more often wanted to be adventurous, even if it lead to danger. Significant outcomes supporting this statement are being daring and adventurous, and chancing risky situations. Furthermore, membership in environmental groups showed that members desired to have outcomes closely associated to conservation themes (e.g., learning about native culture, as well as enjoying the sights, sounds, and smells of nature; learning about nature; and helping to safeguard the forests).

A further analysis involved examining the settings and outcomes by factor analysis. The analysis of setting variables identified six dimensions. The first centered around the theme of *human influences*, with variables such as hearing and seeing all-terrain vehicles and powered water crafts rating highly. Dimension 2 was termed *remoteness/true nature*. Here the highly correlated variables included traveling on low-standard trails and being in areas with no facilities. Due to the concentration of variables on developed trails and areas with interpretive signs, the third dimension has been titled *altered nature*. Dimension 4 was labeled *flora and fauna*, because of the close association of settings with different types of birds, wildlife, and plant life. Dimension 5 centered around *geomorphology*, as this component was closely associated with landscape features (e.g., presence of lakes). Since Dimension 6 concentrated on settings such as logging and mining, it was tagged *industry influences*.

Analysis of the desired outcomes from a northern Ontario trip revealed four significant dimensions. First, the term *interaction* was given to Dimension 1 because of this component's close association to variables concentrating on learning about and meeting new people. Since variables such as relaxing mentally and physically and feeling an emotional release correlate highly with the second dimensions, it was termed *escape*. Dimension 3 was dubbed *adventure/skill improvement*, since being daring and adventurous and developing skills covaried positively with this component. *Conservation* was the label given to the fourth dimension, as enjoying the scenic beauty and learning and appreciating nature had high factor loadings. The final dimension was termed *personal/social improvement*. The variables that loaded highly on this component included being with people who enjoy the same things, and sharing experiences with others.

The above analyses have provided an opportunity to view many of the interesting aspects of this data set. Indeed, it has been shown that socioeconomic differences exist in ecotourism demands for northern Ontario. As well, the questions about settings and outcomes of a future northern Ontario trip can be summarized into themes taking on a greater sense of importance. From these initial results, pertaining to the activities, settings, and outcomes desired from a northern Ontario trip, opportunities for northern Ontario to develop its ecotourism potential should be enhanced.

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**Appendix A. Respondents' Interest for Activities as Measured by Averages from a Three Point Ordinal Scale.**

Activity	Average*	Rank	Activity	Average*	Rank
Visiting provincial or national parks	2.56	1	Bird watching	1.76	31
Hiking, day trip	2.41	2	Snorkelling	1.76	31
Flatwater canoeing, day trip	2.33	3	Winter camping	1.76	31
Hiking, multiple day trip	2.32	4	Bicycling gravel road, day trip	1.75	34
Visiting waterway parks	2.32	4	Bicycling gravel and paved road, multiple day trip	1.73	35
Flatwater canoeing, multiple day trip	2.29	6	Mountain/rock climbing	1.73	35
Cross country skiing, day trip	2.23	7	Viewing roadside attractions	1.73	35
Wildlife viewing	2.20	8	Fishing catch within limit	1.72	38
Swimming	2.16	9	Fishing catch and release	1.72	38
Whitewater canoeing, day trip	2.10	10	Sailing multiple, day trip	1.72	38
Using interpretive services	2.08	11	Horseback riding ,day trip	1.67	41
Viewing local native culture	2.07	12	Dog sledding, day trip	1.65	42
Bicycling paved roads, day trip	2.05	13	Ice skating	1.65	42
Cross country skiing, multiple day trip	2.05	13	Individual sports participation	1.62	44
Whitewater canoeing, multiple day trip	2.02	15	Participating in a guided nature tour	1.62	44
Interacting with local native culture	2.00	16	Snowshoeing, multiple day trip	1.60	46
Viewing human works	1.99	17	Spelunking/caving	1.60	46
Downhill skiing	1.98	18	Scuba diving	1.59	48
Bicycling paved road, multiple day trip	1.93	19	Horseback riding, multiple day trip	1.54	49
Mountain biking, day trip	1.92	20	Dog sledding, multiple day trip	1.51	50
Nature photography	1.92	20	Wind surfing	1.50	51
Viewing local activities	1.92	20	Water skiing and water sports	1.49	52
Participate in educational nature tours	1.88	23	Snowmobiling, day trip	1.41	53
Acquiring artifacts and crafts	1.82	24	Motorized water activities	1.39	54
Snowshoeing, day trip	1.82	24	Outdoor art	1.35	55
Sea kayaking, day trip	1.81	26	Ice climbing	1.32	56
Sailing, day trip	1.80	27	Ice fishing	1.32	56
Mountain biking, multiple day trip	1.79	28	Snowmobiling, multiple day trip	1.29	58
Sea kayaking, multiple day trip	1.78	29	Hunting	1.25	59
Tobogganing and snow play	1.78	29			

\*On a scale from one (not at all interested) to three (very interested).

**Appendix B.** Respondents' Desirability for Settings in Northern Ontario as Measured by Averages from a Five Point Likert Scale.

Setting	Average*	Rank	Setting	Average*	Rank
Presence of lakes	4.83	1	Area remote from food, equipment and supplies	3.28	41
Presence of rivers and streams	4.82	2	Travel on paved roads	3.19	42
Area with views of undisturbed natural scenery	4.73	3	Area where camping is restricted to designated sites	3.12	43
Access to drinking water	4.67	4	No signs in the area	3.05	44
View of waterfalls	4.63	5	Mostly dense, bush-covered areas	3.03	45
Variety of wildlife	4.59	6	Area with past naturally occurring forest fire	3.01	46
View of gorges	4.55	7	Relatively small forested area	2.89	47
Large trees	4.50	8	Travel on low maintenance gravel roads	2.86	48
Variety of plants/trees	4.47	9	Encountering anglers	2.78	49
Mostly undisturbed old-growth forest	4.46	10	Area where trails have no bridges	2.77	50
Variety of birds	4.38	11	Area with no facilities	2.72	51
Presence of rock outcrops	4.35	12	Travel using hydro right-of-ways	2.67	52
An area where trails have bridges over dangerous rivers	4.34	13	Area with a recent naturally occurring forest fire	2.64	53
Rare species of wildlife	4.23	14	Area where no fires are allowed	2.58	54
Area with developed side trails	4.23	14	Area remote from emergency assistance or rescue	2.56	55
Area remote from towns or cities	4.22	16	Recreating on a dammed lake	2.54	56
Access to good swimming	4.17	17	Mostly selective cut forest	2.51	57
Travel in the area on high standard trails	4.16	18	Seeing dams in the area	2.43	58
Relatively large forested area	4.14	19	Continually meeting other people	2.14	59
Travel on lake/river systems	4.12	20	Seeing hydro lines in the area	1.94	60
Presence of beaches	4.12	20	Area with view of residential development	1.83	61
Rare plants	4.11	22	Area with no overnight camping	1.83	61
Rare species of birds	4.10	23	Being in a logged area	1.79	63
Area that has interpretive signs	4.03	24	Seeing powered water craft	1.79	63
Access by gravel/forest road	4.00	25	Seeing evidence of mining	1.75	65
Areas with views of rural landscape	3.90	26	Seeing evidence of logging	1.75	65
Area where trails have bridges over creeks	3.89	27	Seeing a gravel pit	1.73	67
Area with historic sites and buildings	3.85	28	Hearing powered water craft	1.66	68
Occasionally meeting other people	3.82	29	Encountering hunters	1.63	69
Area with interpretive nature and cultural programs	3.80	30	Mostly recent clear-cut forests	1.58	70
Access by boat	3.79	31	Hearing sounds of vehicles	1.54	71
Area with human waste facilities	3.78	32	Seeing all-terrain vehicles	1.51	72
Access to good fishing	3.75	33	Encountering industrial vehicles	1.47	73
Access by paved road	3.70	34	Hearing gun shots	1.46	74
Travel on gravel/forest road	3.65	35	Hearing all-terrain vehicles	1.46	74
Meeting no other people	3.58	36	Area with views of industrial or commercial development	1.37	76
Moderate forested area	3.55	37	Hearing sounds of logging	1.28	77
Mostly second growth, single species younger forest	3.37	38			
Travel on low standard trails	3.37	38			
Access by float plane	3.31	40			

\* On a scale from one (very undesirable) to five (very desirable).



**Appendix C. Respondents' Importance for Different Outcomes of a Northern Ontario Trip as Measured by Averages from a Five Point Likert Scale.**

Outcome	Average*	Rank	Outcome	Average*	Rank
Enjoying the sights, sounds, smells of nature	4.73	1	Being self-reliant	4.09	19
Enjoying the scenic beauty	4.61	2	Making my own decisions	4.08	20
Getting away from civilization for a while	4.54	3	Expanding my interests	4.07	21
Feeling an emotional release from my work	4.47	4	Feeling competent	4.05	22
Relaxing mentally	4.46	5	Developing my skills and abilities	4.05	22
Experiencing a feeling of freedom	4.44	6	Doing something new and different	4.04	24
Doing something with my family or close friends	4.42	7	Relaxing physically	3.98	25
Travelling to and exploring new places	4.41	8	Doing something creative	3.86	26
Learning about and appreciating nature	4.35	9	Thinking about personal or spiritual values	3.82	27
Being physically active	4.34	10	Sharing experiences with others	3.78	28
Being with people who enjoy the same things	4.32	11	Feeling safe and secure	3.77	29
Avoiding hustle and bustle of daily activities	4.29	12	Understanding myself better	3.76	30
Preserving the natural environment	4.28	13	Sharing skill and knowledge with others	3.65	31
Having a stimulating and exciting experience	4.26	14	Learning about the native culture	3.61	32
Keeping physically fit	4.25	15	Experiencing a feeling of control	3.51	33
Helping to safeguard forests and wilderness areas	4.22	16	Meeting new and interesting people	3.45	34
Experiencing new and different things	4.22	16	Learning about local communities	3.40	35
Adding some variety to my daily routine	4.13	18	Being daring and adventurous	3.16	36
			Chancing risky situations	2.76	37

\* On a scale from one (not important) to five (very important).

The views, conclusions, and recommendations contained herein are those of the authors and should be construed neither as policy nor endorsement by Natural Resources Canada or the Ontario Ministry of Natural Resources. This report was produced in fulfillment of the requirements for NODA/NFP Project No. 4052, "A market segmentation analysis of desired ecotourism opportunities".

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